

CREATING, UPDATING, & MANAGING RESPONSIBLE PERSONS

imMTrax User Role Training



Responsible Persons and Reminder/Recall Functions

Reminder Recall:

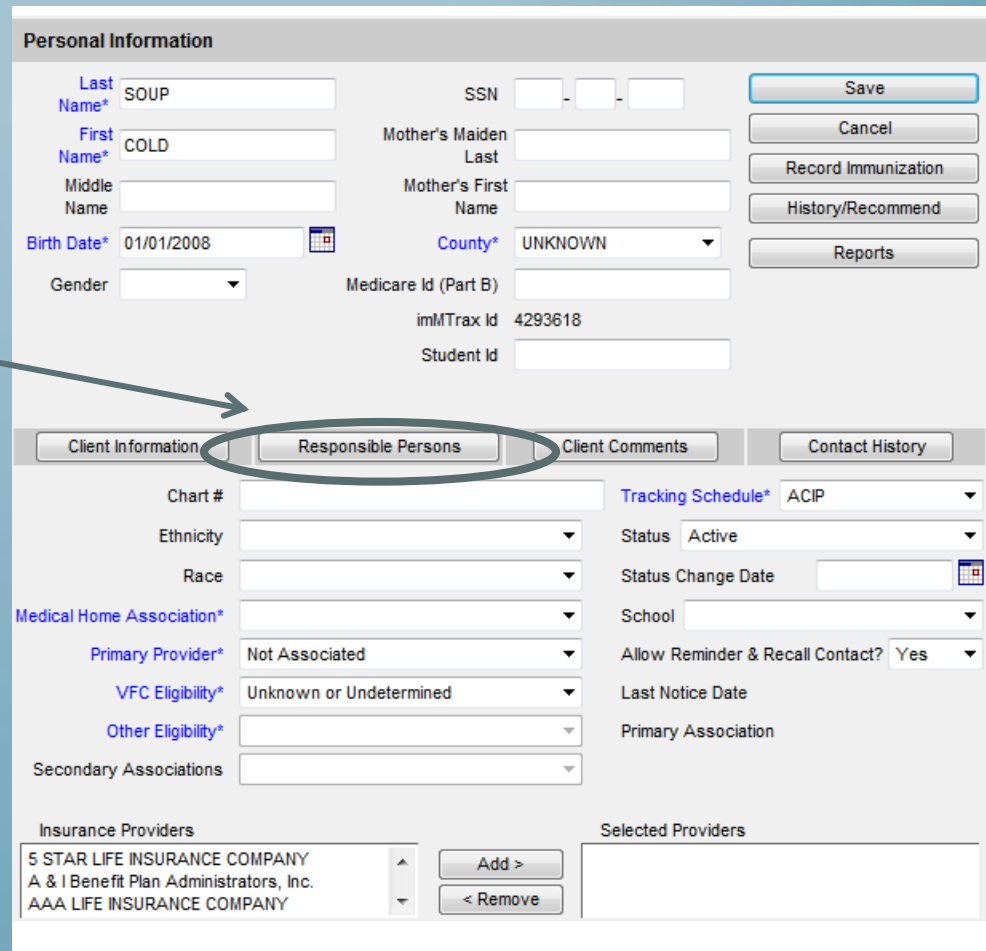
An imMTrax tool allowing the user to generate a series of reminder and recall notices, including:*

- *Immunization Reminder/Overdue Letters and Cards*
- *Mailing Labels*
- *Client Lists (available in downloadable spreadsheet or report formats)*

One Responsible Person, designated as *Primary*, must be saved to the client record to be eligible for Reminder/Recall queries.

Creating and Saving a New Responsible Person

In your client's imMTrax record, select the *Responsible Persons* option



The screenshot shows the 'Personal Information' form in the imMTrax system. The 'Responsible Persons' tab is selected and highlighted with a red circle. An arrow points from the text 'In your client's imMTrax record, select the Responsible Persons option' to this tab. The form contains various fields for personal information, including name, birth date, gender, SSN, and insurance providers.

Personal Information

Last Name* SOUP
First Name* COLD
Middle Name
Birth Date* 01/01/2008
Gender
SSN
Mother's Maiden Last
Mother's First Name
County* UNKNOWN
Medicare Id (Part B)
imMTrax Id 4293618
Student Id

Buttons: Save, Cancel, Record Immunization, History/Recommend, Reports

Tabs: Client Information, **Responsible Persons**, Client Comments, Contact History

Chart #
Ethnicity
Race
Medical Home Association*
Primary Provider* Not Associated
VFC Eligibility* Unknown or Undetermined
Other Eligibility*
Secondary Associations

Tracking Schedule* ACIP
Status Active
Status Change Date
School
Allow Reminder & Recall Contact? Yes
Last Notice Date
Primary Association

Insurance Providers
5 STAR LIFE INSURANCE COMPANY
A & I Benefit Plan Administrators, Inc.
AAA LIFE INSURANCE COMPANY

Selected Providers

Buttons: Add >, < Remove

Creating and Saving a New Responsible Person

Begin by searching for the Responsible Person you wish to add.

Enter the **complete** first and last name into the appropriate fields.

Click *Find*.

Personal Information

Last Name*	SOUP	SSN	- - -	Save
First Name*	COLD	Mother's Maiden Last		Cancel
Middle Name		Mother's First Name		Record Immunization
Birth Date*	01/01/2008	County*	UNKNOWN	History/Recommend
Gender		Medicare Id (Part B)		Reports
		imMTrax Id	4293618	
		Student Id		

Client Information Responsible Persons Client Comments Contact History

Search Below for existing contacts in imMTrax
(hint: use less data to get more possible matches)

Last Name*	Soup	Telephone		Find
First Name*	Virginia	Street Address		
Middle Name		City		
		State	MONTANA	
		Zip		

Creating and Saving a New Responsible Person

Outcome 1: No Matches Found

If no results were found, begin entering the information that corresponds with the responsible person you are adding.

Client Information		Responsible Persons		Client Comments		Contact History	
<i>No Results or Results not Matching • Add NEW contact</i>							
Last Name*	SOUP	Street				<input type="button" value="Add Person"/>	
First Name	VIRGINIA	Address*				<input type="button" value="Search Again"/>	
Middle Name		Other					
Relationship*	Unknown ▼	Address					
E-Mail		P.O. Box					
Telephone 1		City*					
Extension 1		State*	MONTANA ▼	Zip*		+4	
Telephone 2		Language		County*	UNKNOWN ▼		
Extension 2		Type 1	Business ▼	Recall Notices?	<input type="checkbox"/>		
		Type 2	Business ▼	Primary?	<input type="checkbox"/>		
				Preferred Method of Recall			

Creating and Saving a New Responsible Person

Complete:

- Last Name
- First Name
- Relationship
- Street Address
- City
- Zip Code
- County
- State

Client Information		Responsible Persons		Client Comments		Contact History	
<i>No Results or Results not Matching - Add NEW contact</i>							
Last Name* SOUP		Street Address* 159 Kings Ave				<input type="button" value="Add Person"/>	
First Name VIRGINIA		Other Address				<input type="button" value="Search Again"/>	
Middle Name		P.O. Box					
Relationship* Mother		City* Billings					
E-Mail		State* MONTANA		Zip* 59103 +4			
Telephone 1 406 444 5555		Language		County* YELLOWSTONE			
Extension 1		Type 1 Business		Recall Notices? <input checked="" type="checkbox"/>			
Telephone 2				Primary? <input checked="" type="checkbox"/>			
Extension 2		Type 2 Business		Preferred Method of Recall Mail			

Creating and Saving a New Responsible Person

Establish whether the Responsible Person should be designated as Primary (each client record should have one).

Client Information Responsible Persons Client Comments Contact History

No Results or Results not Matching - Add NEW contact

Last Name* SOUP Street Address* 159 Kings Ave Add Person
First Name VIRGINIA Other Address Search Again
Middle Name P.O. Box
Relationship* Mother City* Billings
E-Mail State* MONTANA Zip* 59103 +4
Telephone 1 406 444 5555 Language County* YELLOWSTONE
Extension 1 Type 1 Business
Telephone 2 Type 2 Business
Extension 2 Type 2 Business

Recall Notices? ☒
Primary? ☒
Preferred Method of Recall Mail

Creating and Saving a New Responsible Person

Should this person receive
Reminder/Recall
correspondence?

If checked, the Preferred
Method of Recall must be
selected and matching
information be available in the
Responsible Person
information.

Client Information **Responsible Persons** **Client Comments** **Contact History**

No Results or Results not Matching - Add NEW contact

Last Name* SOUP Street Address* 159 Kings Ave Add Person
First Name VIRGINIA Other Address Search Again
Middle Name P.O. Box
Relationship* Mother City* Billings
E-Mail State* MONTANA Zip* 59103 +4
Telephone 1 406 444 5555 Language County* YELLOWSTONE
Extension 1 Type 1 Business
Telephone 2 Extension 2 Type 2 Business

Recall Notices? ☒
Primary? ☒
Preferred Method of Recall Mail

Preferred Method of Recall options
include Mail, Phone, Email and Text.

Creating and Saving a New Responsible Person

Select Add Person.

Client Information Responsible Persons Client Comments Contact History

No Results or Results not Matching - Add NEW contact

Last Name* SOUP Street Address* 159 Kings Ave **Add Person**
First Name VIRGINIA Other Address Search Again
Middle Name P.O. Box
Relationship* Mother City* Billings
E-Mail State* MONTANA Zip* 59103 +4
Telephone 1 406 444 5555 Language County* YELLOWSTONE
Extension 1 Type 1 Business Recall Notices? ☒
Telephone 2 Primary? ☒
Extension 2 Type 2 Business Preferred Method of Recall Mail

Creating and Saving a New Responsible Person

Review your entries and select *Save*.

Personal Information

Last Name*
SOUP

SSN
- -

Save

Cancel

Record Immunization

History/Recommend

Reports

First Name*
COLD

Mother's Maiden Last

Mother's First Name

Middle Name

Birth Date*
01/01/2008

County*
UNKNOWN

Gender

Medicare Id (Part B)

imMTrax Id
4293618

Student Id

Client Information

Responsible Persons

Client Comments

Contact History

Responsible Persons Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary	
<input checked="" type="radio"/>	SOUP	VIRGINIA	MTH	Billings	Y	Y	<div>New Person</div> <div>Delete</div>

Details for Responsible Person: VIRGINIA SOUP (Last Updated:)

1 of 1

Last Name*
SOUP

Street Address*
159 Kings Ave

Other Address

P.O. Box

Relationship*
Mother

City*
Billings

E-Mail

State*
MONTANA

Zip*
59103 +4

County*
YELLOWSTONE

Telephone 1
406 444 5555

Language

Extension 1

Type 1
Business

Telephone 2

Extension 2

Type 2
Business

Recall Notices?
☒

Primary?
☒

Preferred Method of Recall
Mail

Next

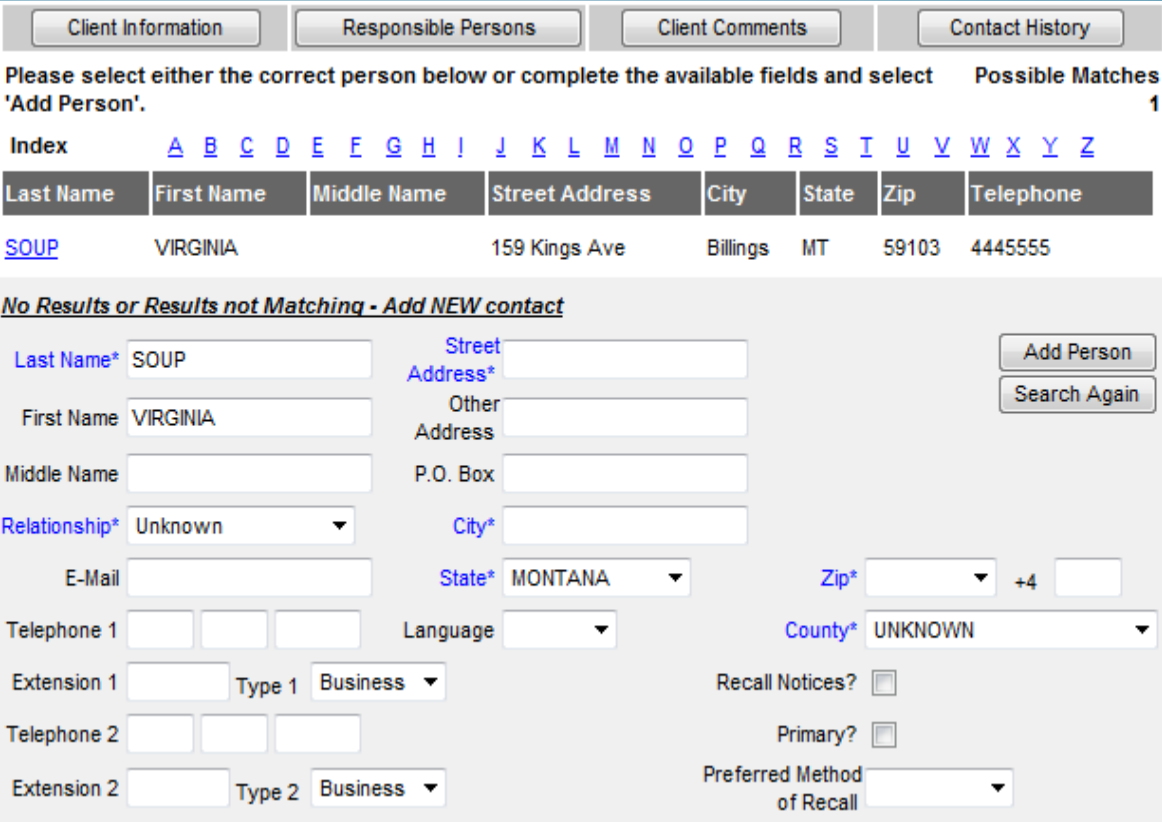
Previous

Creating and Saving a New Responsible Person

Outcome 2: Possible Matches Found

No Match?

Proceed with entering your information to add the new Responsible Person.



The screenshot displays a web application interface for managing responsible persons. At the top, there are four tabs: 'Client Information', 'Responsible Persons', 'Client Comments', and 'Contact History'. Below the tabs, a message states: 'Please select either the correct person below or complete the available fields and select 'Add Person'.' To the right of this message, it says 'Possible Matches 1'.

Below the message is a table with columns: Index, Last Name, First Name, Middle Name, Street Address, City, State, Zip, and Telephone. The table contains one row with the following data: Index (A), Last Name (SOUP), First Name (VIRGINIA), Middle Name (), Street Address (159 Kings Ave), City (Billings), State (MT), Zip (59103), and Telephone (4445555).

Below the table, there is a section titled 'No Results or Results not Matching - Add NEW contact'. This section contains a form with the following fields: Last Name* (SOUP), First Name (VIRGINIA), Middle Name (), Relationship* (Unknown), E-Mail (), Telephone 1 (), Extension 1 (), Telephone 2 (), Extension 2 (), Street Address* (), Other Address (), P.O. Box (), City* (), State* (MONTANA), Zip* (), +4 (), Language (), County* (UNKNOWN), Recall Notices? (), Primary? (), and Preferred Method of Recall (). There are two buttons on the right: 'Add Person' and 'Search Again'.

Creating and Saving a New Responsible Person

Match?

Select the blue hyperlinked last name of the person you want to add to the client record.

Client Information Responsible Persons Client Comments Contact History

Please select either the correct person below or complete the available fields and select 'Add Person'. Possible Matches 1

Index A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Last Name	First Name	Middle Name	Street Address	City	State	Zip	Telephone
SOUP	VIRGINIA		159 Kings Ave	Billings	MT	59103	4445555

No Results or Results not Matching - Add NEW contact

Last Name* Street Address*

First Name Other Address

Middle Name P.O. Box

Relationship* City*

E-Mail State* Zip* +4

Telephone 1 Language County*

Extension 1 Type 1 Recall Notices? ☐

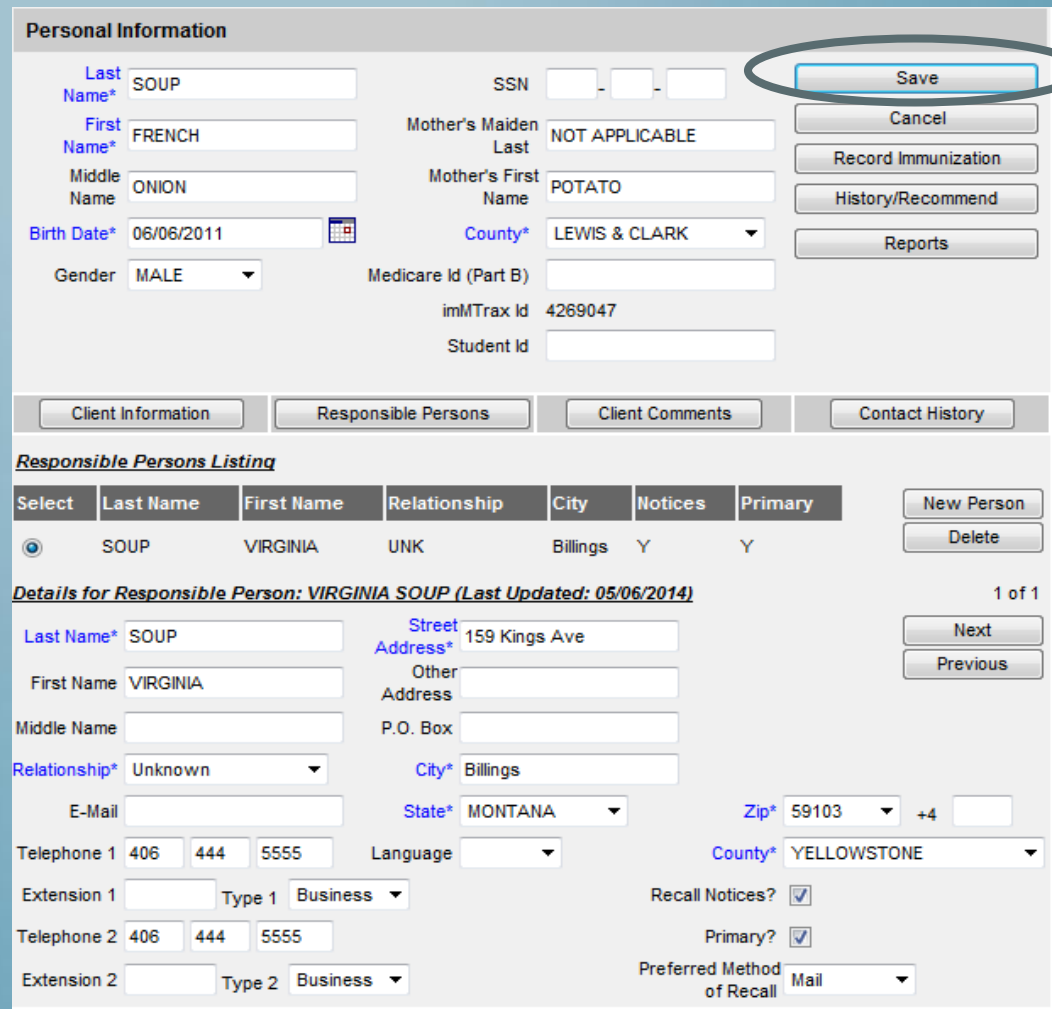
Telephone 2 Primary? ☐

Extension 2 Type 2 Preferred Method of Recall

Creating and Saving a New Responsible Person

Review your selection and make changes as applicable.

Click *Save*.



Personal Information

Last Name* SOUP SSN - - - Save
First Name* FRENCH Mother's Maiden Last NOT APPLICABLE Cancel
Middle Name ONION Mother's First Name POTATO Record Immunization
Birth Date* 06/06/2011 County* LEWIS & CLARK History/Recommend
Gender MALE Medicare Id (Part B) Reports
imMTrax Id 4269047
Student Id

Client Information Responsible Persons Client Comments Contact History

Responsible Persons Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	SOUP	VIRGINIA	UNK	Billings	Y	Y

New Person
Delete

Details for Responsible Person: VIRGINIA SOUP (Last Updated: 05/06/2014)

1 of 1
Next
Previous

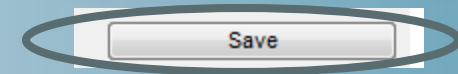
Last Name* SOUP Street Address* 159 Kings Ave
First Name VIRGINIA Other Address
Middle Name P.O. Box
Relationship* Unknown City* Billings
E-Mail State* MONTANA Zip* 59103 +4
Telephone 1 406 444 5555 Language County* YELLOWSTONE
Extension 1 Type 1 Business Recall Notices? ☒
Telephone 2 406 444 5555 Primary? ☒
Extension 2 Type 2 Business Preferred Method of Recall Mail

Updating and Managing Responsible Persons

Updating a Responsible Person's information in a client record will update any other imMTrax record with that Responsible Person correctly attached.

Deleting a Responsible Person from a client record will only remove the Responsible Person from that record.

Updating and Managing Responsible Persons



Making changes to existing Responsible Persons

Client Information Responsible Persons Client Comments Contact History

Responsible Persons Listing

Select	Last Name	First Name	Relationship	City	Notices	Primary
<input checked="" type="radio"/>	SOUP	MILD	GRP	Miles City	N	N
<input type="radio"/>	SOUP	VIRGINIA	UNK	Billings	Y	Y

Details for Responsible Person: MILD SOUP (Last Updated: 05/06/2014)

1 of 2

Last Name* SOUP Street Address* 12345 Planet St

First Name MILD Other Address

Middle Name P.O. Box

Relationship* Grandparent City* Miles City

E-Mail State* MONTANA Zip* 59301 +4

Telephone 1 Language County* CUSTER

Extension 1 Type 1 Business Recall Notices? ☐

Telephone 2 Primary? ☐

Extension 2 Type 2 Business Preferred Method of Recall

New Person Delete Next Previous

→ Select the Responsible Person to be edited.

← Delete the selected Responsible Person or make any edits needed.

Questions?

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